U.S. Department of Energy

Office of Management and Administration

Windows 2000 / Office 2000 Upgrade

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1. WINDOWS OPERATING SYSTEM

1.0 Changes / What's New

- Things that will look different in general:
 - Outlook Today
 - Journal in Outlook
 - > Help
 - Windows Explorer
 - Open folders (have big icons now)
 - Icons (picture at bottom)
 - Drop down menus (recent items only)
 - Toolbars (overlapping)
 - > Status bar (open documents showing)
- The <Ctrl+Alt+Del> startup screen.
- More backgrounds for desktop.
- Personalized Menus Toolbar menus only show the most recently used items. To see all items, hold mouse over or click on the double arrow at the bottom of the menu. This feature can also be turned off.
- The Office Assistant can be permanently removed (see 1.1.4).
- General Windows and Office icons are different.
- Help has a new layout.
- When browsing folders, large icons are default (see 1.5).
- When a default option is changed in one Office package, it is changed in all packages.
- In Office 2000, data can be e-mailed directly from Word, Excel, etc. without using Outlook. (see 3.5)
- Drag items to and from the Start and Favorites menus.
- Support in Office for handwriting.
- Find Printers Can look for any printer in your network.
- Collect and paste with the Office Clipboard.
- Multiple Office documents are represented by different icons in the Windows taskbar
- Shortcuts can be made on Office toolbars to files, folders, and web pages
- Click and Type Use Click and Type to quickly insert text, graphics, tables, or other items in a blank area of a document. Click and Type automatically applies the formatting necessary to position the item where you double-clicked. For example, to create a title page, double-click in the middle of a blank page, and then type a centered title.
- Web Folders feature manage your files stored on a web server

1.1 Office Assistant

The **Office Assistant** provides help and allows questions to be entered in plain English.

1.1.1 Choose an Assistant

- Right-click on the Assistant.
- Click Choose Assistant.
- Follow the on-screen instructions.
- □ Click OK.

1.1.2 Change Assistant Options

- □ Right-click on the **Assistant**.
- Click Options.
- Click the desired options.
- □ Click OK.

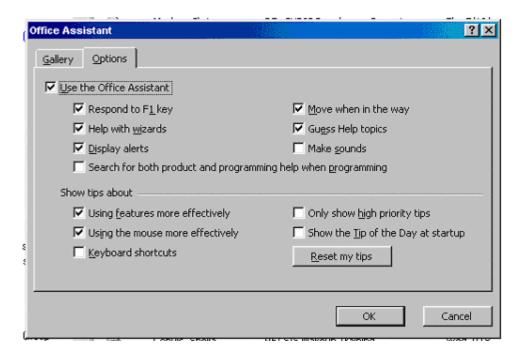
1.1.3 Hide the Assistant

- Right-click on the Assistant.
- Click Hide.

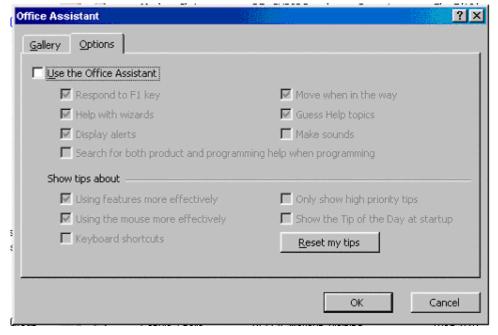
Note: Hiding the **Assistant** does not permanently remove it. The **Assistant** is activated each time **Help** is used or certain application templates are accessed.

1.1.4 Permanently Remove the Assistant

- Once the **Assistant** has been hidden several times, a prompt to permanently remove the **Assistant** appears.
- Select Yes.
- If the Office Assistant window comes up, select the **Options** tab and click the box for **Use the Office Assistant** to turn it off.



 Note that all boxes are grayed out except Use the Office Assistant.



1.1.5 Use the Assistant

- Click Help and select Show the Office Assistant. The Assistant appears.
- Click on the **Assistant** to display a text box.

- Enter a question or click the desired choice.
- Click Search.
- Click the relevant **Topic**.
- □ When finished, click **X** to close **Help**.

1.1.6 Help

Microsoft offers help for all of its products through the **Help** tab on the **Menu** toolbar or by clicking [**F1**] on the keyboard. An entire library of "Ask in plain English" answers resides in each application. In addition, the **Help** tab menu has a direct link to **Microsoft's Online Help** site.

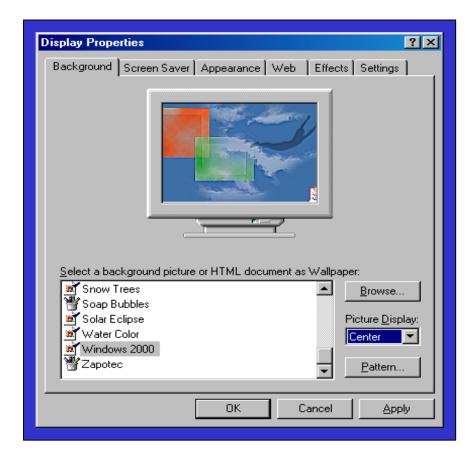


1.2 Customizing Desktops

Windows 2000 does not have a Plus! System as in previous Windows operating systems nor does it support the use of themes. In addition, the themes executable is no longer part of the control panel. Background wallpaper and font selection as well as screen saver personalization is available. The following exercises explain the process.

1.2.1 Displaying the Display Properties Window

- Click the right mouse button anywhere on the **Desktop** and a menu is displayed.
- Select **Properties** from the menu, and the window shown below is displayed.



1.2.2 Selecting a Desktop Picture or Wallpaper

- Display the **Display Properties** window as shown in **1.2.1**.
- Click the name of a background or picture in the lower portion of the window. Once a name is selected, a preview of the selection is displayed in the "monitor".
- Once a picture is chosen, click the name once, and then click OK.

1.2.3 Enabling the Screen Saver

- Display the Display Properties window as shown in 1.2.1.
- Select the Screen Saver tab located near the top of the window.
- Click the arrow located beside the Screen Saver field and make a selection from the available options.
- To see a preview of the selection, click Preview.
- To change the setting for the screen saver, click Settings.

 Once a Screen Saver is chosen, select the name from the menu, and then click OK.

1.2.4 Specifying Window Colors

- Display the **Display Properties** window as shown in **1.2.1**.
- Click Appearance.
- Click the **Arrow** located beside the **Scheme** field and make a selection from the available options.
- Once a Scheme is selected from the menu, click OK.

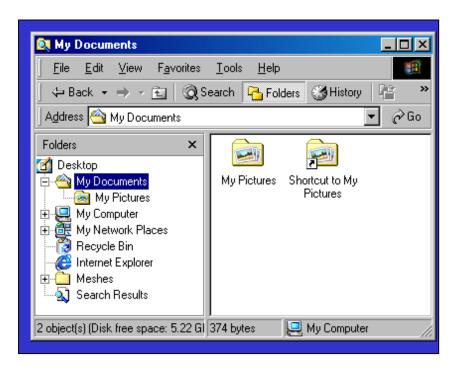
1.3 Shortcuts

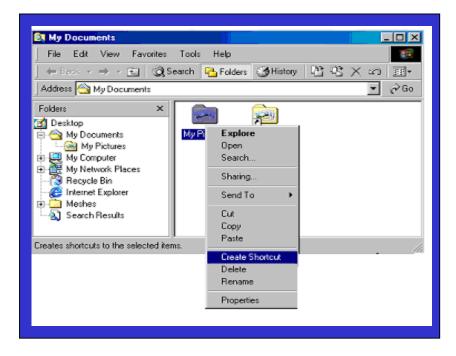
A **Shortcut** is an icon that provides quick access to a particular file, folder or drive. **Shortcuts** have small arrows in the lower left corner of the picture.



1.3.1 Creating a Shortcut

- Open the Windows Explorer by clicking Start Menu, then point to Programs, then point to Accessories, and then click Windows Explorer. A window will appear as shown below.
- Locate the file or folder to create the Shortcut from in Windows Explorer. Right-click on that folder. A menu is displayed as shown below.
- Select Create Shortcut. The Shortcut is created and is placed at the bottom of the file list in the folder of the originating file.





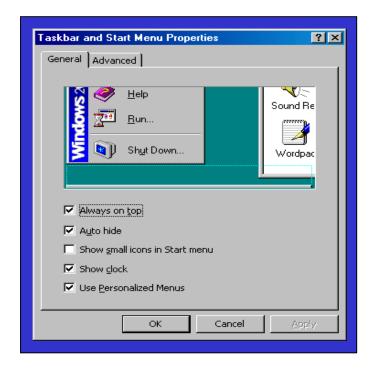
 Move the **Shortcut** to the desired location by dragging or cutting and pasting.

1.4 <u>Customizing Taskbar and Start Menu</u>

The **Taskbar** provides a way to organize multiple open windows. The **Start Menu** provides quick access to launch programs/applications, open recent documents, search drives and shut down the operating system. **Windows 2000** provides options for customizing the operation of the **Taskbar** and **Start Menu**.

1.4.1 Displaying Taskbar and Start Menu Properties

- Position the mouse cursor over the Taskbar, making sure the cursor is not over a Taskbar element such as a Task button or System Clock or Start Menu button.
- Click the right mouse button, and a menu is displayed.
- Select **Properties** from the menu and the window shown below is displayed.



1.4.2 Specifying General Options

Display the Properties menu as outlined in 1.4.1.

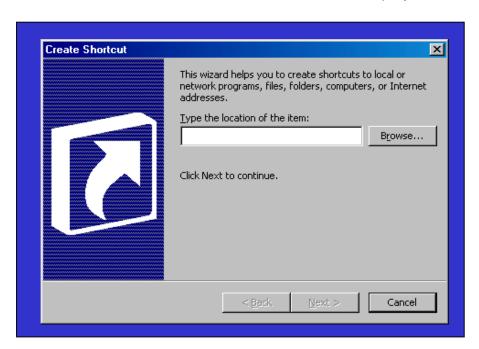
- □ Click the **Checkbox** located beside an option to enable it. When an option is enabled, a check appears in the **Checkbox**.
- □ To disable an option, click the **Checkbox**. When an option is disabled, the check no longer appears.

1.4.3 Specifying Start Menu Settings

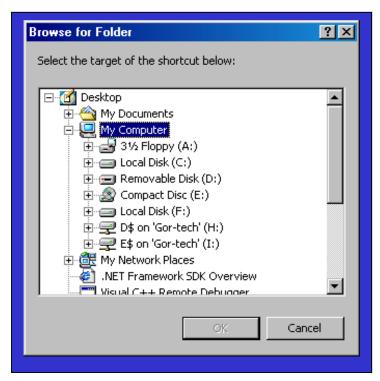
- Display the Properties menu as outlined in 1.4.1.
- Click Advanced.
- □ To enable a **Start Menu** option, click the **Checkbox** located beside the option. When an option is enabled, a check appears in the **Checkbox**.
- □ To disable an option, click the **Checkbox**. When an option is disabled, the check no longer appears.

1.4.4 Adding an Item to the Start Menu

- Display the **Properties** menu as outlined in **1.4.1**.
- Click Advanced.
- Click Add. The window shown below will display.



□ Click **Browse**. The window displayed below will appear.



- Locate the program or application that is to be added to the **Start Menu**.
- Click the Folder, and click OK.
- Click Next.
- □ Locate the **Folder** where the item is to be stored, or click **New Folder**, and a new folder is placed in the folder list.
- □ Enter a new name for the **Folder**, then click **Next**.
- Enter a name for the Shortcut, and then click Finish.
- Click Ok.

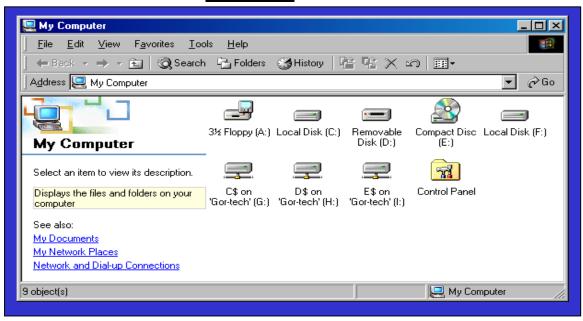
1.5 Folders View

With the new desktop, the look and functionality of folders can be altered. The desktop default folder view is **Web Style.** This means that the desktop is "active," all of the folders look like web pages, and it requires only a single-click to open items. If you prefer working the way you're used to in Windows, the **Classic Style** for is available.

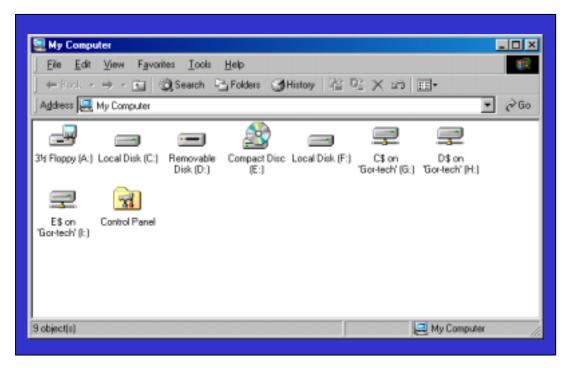
1.5.1 Change Folders View

- Double-click My Computer on the Desktop.
- On the Menu bar, click Tools.
- Select Folder Options. Go to Web View.
- Select Enable Web Content in Folders Style or Use Windows Classic Folders.
- □ Click **OK**.

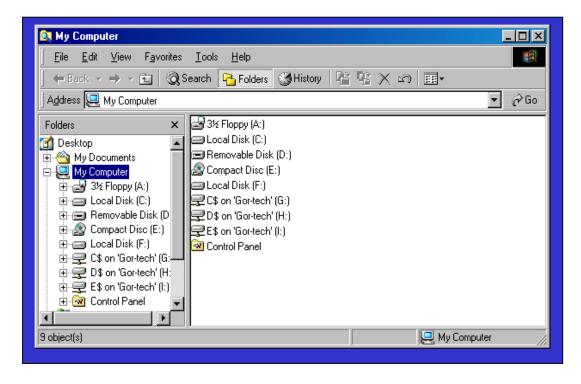
Web Style



Classic Style-Large Icons



Classic Style-List



2.0 **WORD**

2.0 Changes / What's New

- Personalized Menus
- Toolbars are sometimes on top of each other by default
- Two new toolbar shortcuts are available to create Adobe Acrobat PDF documents
- Check the spelling and grammar in another language
- Synonyms list right-click a word, and then point to Synonyms.
- Nested tables tables inside other tables.
- Frames pages Use frames to create a more organized web site
- Web layout view see how your web pages look in a web browser
- Use scripts in your web documents
- · E-mail documents from inside Word
- Subscribe to a document or folder be notified by e-mail of any changes made to a document or folder on a particular web server running Microsoft Office Server Extensions

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2.1 Synonym Finder

The Synonym Finder provides word alternatives.

2.1.1 Finding a Synonym

- Right-click on a word in a sentence to view a **Synonym** list.
- Click to select a word and it is automatically inserted into the document.
- In addition to the list provided, additional words can be found.
 Right-click on a word then select Synonym, and then select
 Thesaurus.
- Select the desired word and click **Replace.** The original word is replaced with the new selection.
- Note: Not all words have a synonym list and the Synonym Finder is not available with certain formatting such as bulleting.

2.2 **Smart Replace**

Using the **Replace** feature, (Edit, Replace), you can tell Word to **Replace With** the contents of the **Clipboard**.

2.2.1 Replacing Text

- Right click on the Menu bar and check Clipboard.
- □ A **Clipboard** toolbar appears.
- Copy the desired image to the Clipboard. Right click the desired image and select Copy.
- □ The item is transferred to the **Clipboard**.
- Click Edit, and then click Replace. The Find and Replace dialog box opens.
- Type the desired text in the Find What text box.
- Click in the Replace With and do (Shift^). A ^ mark will appear.
- □ Type the character (c), lower case. The box will show (^c).
- Click Replace. The picture or text will be replaced with the contents of the Clipboard. Resize the image as desired.
- When finished, click Cancel.

2.3 Floating Tables

A table can be placed anywhere within a document. Text can be wrapped around a table allowing more freedom in page layouts.

2.3.1 Building a Table

 Click **Table** on the **Menu** bar, select **Inser**t, and then select **Table**.

Choose the desired dimensions and click OK. A Table is inserted in the document. Click anywhere on the table to display a crosshair box in the upper left hand corner. Move with the mouse to position the box to the desired spot. 2.3.2 Text Wrapping Click View on the Menu bar and then select Print Layout View. Right-click on the inserted Table and choose Table Properties. Select the desired Alignment and Text Wrapping. Below are two samples. Click OK. This is an example of **Center Alignment**. As you type the text for the table the text is aligned around the entire table and will continue to wrap around the table as text is written. This allows the table to be the center and focus of the page or paragraph. Typical features still exist. Text can be inserted, bolded, italicized, colored, and underlined as in any word document.

and will continue to wrap around the table as text is written. This allows the table to be the center and focus of the page or paragraph. Typical features still exist. Text can be inserted, **bolded**, *italicized*, **colored**, and <u>underlined</u> as in any word document.

This is an example of **Left Alignment**. As you type the text for the table the text is aligned around the entire table

3.0 OUTLOOK

3.0 Changes / What's New

- Personalized Menus
- Outlook Today is different (see 3.1)
- Journal is different

3.1 Outlook Today

Outlook Today is a daily overview of task lists, calendars, and pending eMails (unread, unsent, or drafts). In addition to providing an overview of the day, in **Outlook Today** completed tasks can be 'checked off' and quick access is gained to **Outlook** folders and schedules.

3.1.1 Changing Outlook Today Options

- In Outlook, click View on the Menu bar.
- Select Go To and then select Outlook Today.
- Press Enter.
- Click Customize Outlook Today located to the right of the date and the window shown below will display. Here changes can be made to Startup, Messages, Calendar, Tasks, and Styles.



3.2 **Shortcuts on the Outlook Bar**

In Outlook, whenever a new folder is created, a prompt appears with a suggestion to create a **Shortcut Icon** for the new folder on the **Outlook Bar**. In addition, a **Shortcut** for any existing folder can be added.

3.2.1 Add a Shortcut for Existing Folder

- □ In the **Folder List**, right-click on the folder of choice.
- Select Add to Outlook Bar from the Shortcut menu.
- Drag the new link to the Toolbar.

3.2.2 Create a New Folder and Shortcut

- Click File, select Folder, and then select New Folder.
- A Shortcut prompt will appear as shown below.
- Choose 'Yes' at the Shortcut prompt.



3.2.3 Remove a Shortcut

- Right-click on the **Icon** to be removed.
- Choose Remove from Outlook Bar.
- □ This will not delete the folder; this will only remove the **Shortcut** link to the folder.

3.3 **Archiving Mail**

The **Outlook Auto Archive** feature is set to run every 14 days for the Inbox.

Other **Outlook** folders are set to archive at other intervals. These are **Calendar** (6 months), **Tasks** (6 months), **Journal** (6 months), **Sent Items** (2 months), and **Deleted Items** (2 months).

Archived mail will be stored on the Network. It is available through your **Archive Folders** on your **Folders List**.

When folders are archived, items are moved from their existing folders into an archive type of personal folder file (**pst**). By default, **Outlook** saves archived items in the following location:

Network Drive:\Login name.pst

The file **Network Drive:\Login name.pst** is like any other **.pst** in that it retains the same file structure as the original folders and it can be added or removed from an **Outlook** profile.

In addition, the file name (**Login name.pst**) and location (**Network Drive:\Login name.pst.**) of **Outlook** archived items can be changed and archived by another name and in another location. However, the Network Drive is the only drive that is backed up each night.

3.3.1 Creating Personal Folder Files

On the File menu, click Exit and Log Off.
Click Start on the Windows taskbar , point to Settings , and then click Control Panel .
In Control Panel, double-click the Mail (or Mail and Fax) icon.
On the Services tab, click Show Profiles.
Click to select the desired profile to add as a new Personal Folders file. Click Properties.
On the Services tab, click Add.
In the Available Information Services list, click Personal Folders. Click OK.
In the Create/Open Personal Folders File dialog box, type a name for the new Personal Folders file with a .pst extension.
Click Open.
In the Create Microsoft Personal Folders dialog box, the names listed in Outlook for this Personal Folders file may be changed at this time.
Click OK .
Click OK again.
Click Close. When Outlook is restarted, the new name will be in the Personal Folders file in the Folders list.

3.3.2 Transferring Mail to a New Personal Folders File

- □ Select **Inbox** or a subfolder from which mail is to be transferred.
- Highlight the desired mail folder.
- Right-click on the highlighted section and choose
 Move to Folder.
- A dialog box titled Move Items will appear.
- Select the **Personal Folder** previously created and then click **OK**.
- □ The selected mail will move to the **Personal Folder** chosen.

3.3.3 Custom Archive Name and Location

- On the Tools menu, click Options.
- Click Other.
- Click Auto Archive.
- In the **Default Archive File** box, type the path and file name for the location where the items are to be archived. Be sure to use the .pst extension in the file name.
- Click OK.
- Click OK again.

3.3.4 Adding an Archive File to A Profile

- On the Tools menu, click Services.
- On the Services tab, click Add.
- In the Available Information Services list, click Personal Folders.
- Click OK.

- In the Create/Open Personal Folders File dialog box, navigate to the custom archive .pst file created in 3.3.3 and click to select.
- Click Open.
- □ In the **Name** box, enter **Archive**.
- Click **OK**. This step adds **Archive** to the list of profile services.
- Click **OK** in the **Outlook Standard** toolbar, and then click **Folder List** to display, if not already displayed.
- □ In the **Folder List**, an **Archive** folder with the archived items in the appropriate subfolder will display.

3.3.5 Viewing Folder Size

- Right click a folder, Inbox for example, in the Folder List.
- Select Properties.
- Select Folder size located just above the **OK** button.
- The folder size of that particular folder is displayed.
- Click Close.
- Click Cancel.
- In addition, choosing the Outlook Today folder for step one and continuing with the rest of the procedure will display the folder size of all of your Outlook folders.

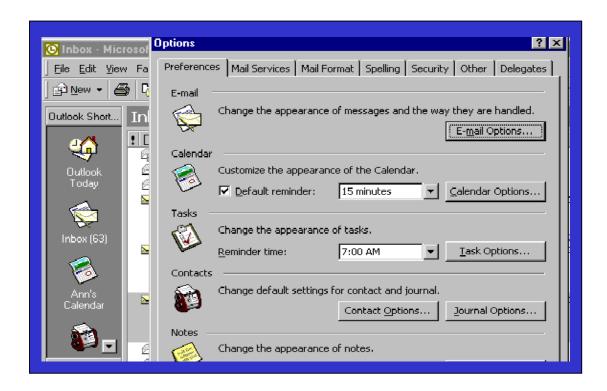
3.4 Using WORD as the eMail Editor

To use **Microsoft Word** as the eMail Editor, it must be activated.

3.4.1 Activating WORD

- In Outlook, click the Tools menu and select Options.
- A screen will appear as shown below.

- □ On the Mail Format tab, click to select the Checkbox "Use Microsoft Word to edit e-mail messages."
- □ Click **OK**.

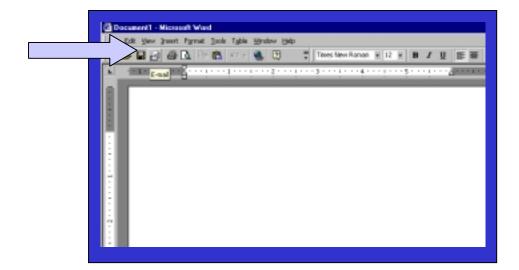


3.5 <u>eMail Directly from Office Applications</u>

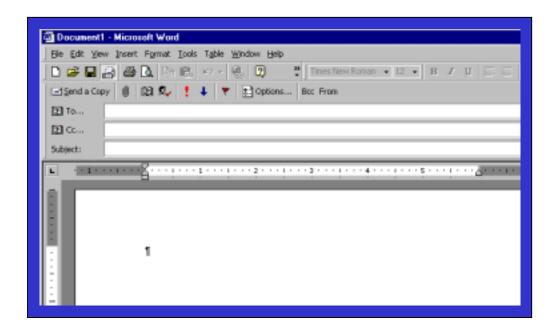
In Office 2000, data can be eMailed without leaving any of the Office 2000 applications (Word, Excel, PowerPoint).

3.5.1 eMail a Document

- □ Choose the email button on the **Toolbar** of the open **Office 2000** application.
- □ Below is an example of a Word 2000 document.



- As shown below, a screen appears changing the document to an email format. This enables **Outlook** to send it as an eMail directly.
- □ The document is sent using **HTML** so anyone with a **Web Browser** can view it.



3.5.2 How Office 2000 Applications Treat eMail

- □ **Word** will embed documents into the body of the eMail message.
- Excel will prompt that the worksheet be sent as an attachment, or message body.
- PowerPoint will embed slide(s) into the message body.

4.0 EXCEL

4.0 Changes / What's New

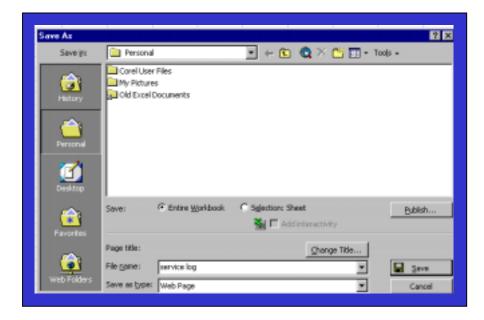
- Personalized Menus.
- Workbooks can be saved directly to the web.
- Easier and safer debugging of formulas (see 4.2).
- When you select cells with colored text, the color remains the same instead of appearing in an inverse color scheme.
- Additional number formats are available with the euro currency symbol.

4.1 Excel and the Web

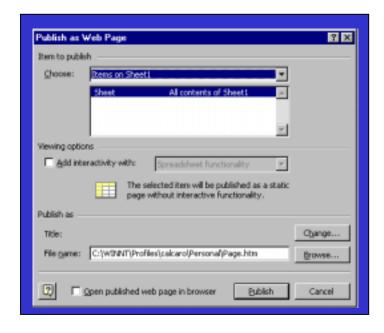
In **Excel**, workbooks can be saved, which may contain worksheet data, charts, etc. to local (**Intranet**) or web (**Internet**) folders. With **Excel 2000**, an active connection to the **Internet** prior to running a web query is not required as was in **Excel 97**. Now, a prompt for connection will appear if not already connected.

4.1.1 Saving as a Web Page

- Open the Excel application.
- Select desired cells.
- Click on the File menu.
- Click Save as Web Page.
- □ The **Save As** dialog box opens. It contains additional options as shown below.



- Select the Folder or FTP site on which to store the document.
- Select Entire Workbook or Selection: Sheet.
- Click Publish. The Publish Web Page dialog box appears as shown below.

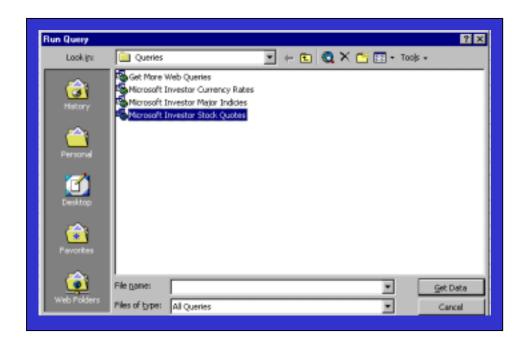


- Select the item to Publish in the Choose List box.
- Select Add interactivity with and choose an option from that list.

- □ To specify a title, click **Change**.
- In the **File name** box, type the location and web document name.
- Click Publish.

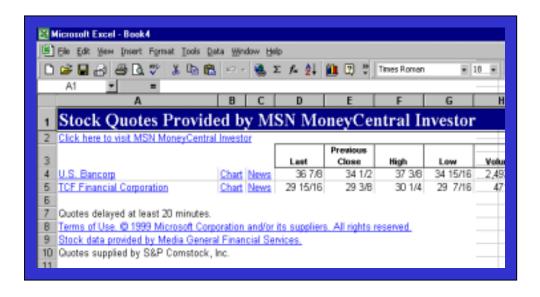
4.1.2 Web Queries

- □ Select Data.
- Select Get External Data.
- Select Run Saved Query.
- The Run Query dialog box will appear as shown below.



- To run a Specific Query now, select an Item from the Run Query dialog box.
- Click Get Data.
- If the query chosen is a **Parameter Query**, a prompt to supply the parameters appears.

- Enter the Parameters.
- The Query will be executed and the results returned to Excel.
- The following is a sample result.



4.2 <u>Debugging Formulas</u>

Debugging formulas for **Excel** can be frustrating. A new back up strategy has been incorporated in **Excel 2000**. It allows experimentation with formulas and functions without losing work or damaging a worksheet.

4.2.1 Debugging a Worksheet

- Copy and Paste the **Formula** to debug to another cell (as back up).
- Take out the (=) sign from the Formula in the Formula bar.
- □ Change the original **Formula** to the desired one and experiment.
- When ready, put the (=) sign back in the changed
 Formula and test.

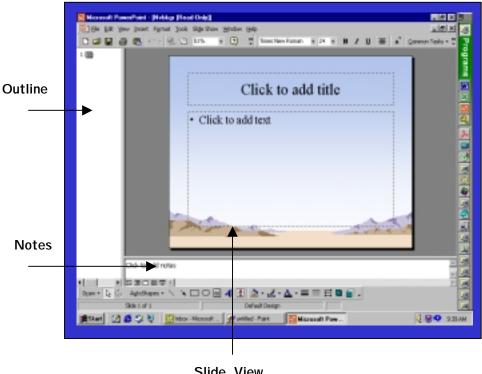
5.0 POWERPOINT

5.0 Changes / What's New

- Personalized Menus Toolbar menus only show the most recently used items. To see all items, hold mouse over or click on the double arrow at the bottom of the menu. This feature can also be turned off.
- New normal view The new normal view simultaneously displays the slide, outline, and notes views in their own adjustable panes, so you can see everything at once.
- Projector Wizard The Projector Wizard automatically sets and restores the correct screen resolution for the projection system that you are using. Most popular projection systems are supported.
- Native table tools create and format tables within PowerPoint
- Graphical bullets add extra flair to your slides
- Numbered lists are now supported in PowerPoint
- Handout options have been expanded. Now you can print two, three, four, six, or nine slides on a page in either horizontal or vertical orientation.
- Voice narration can now be recorded one slide at a time
- Scanner support scan a picture directly into PowerPoint from most TWAIN-compatible scanners and digital cameras.
- Presentation broadcasting schedule and give a slide show over the Web, complete with audio and video.

5.1 Tri-Pane View

The **Tri-Pane View** interface puts all relevant information on a single screen. In addition to the outline view and the active slide view of the presentation, **PowerPoint 2000** displays the speaker's notes concurrently. This allows a speaker to organize thoughts while viewing a particular slide. Below is a sample screen.



Slide View

5.2 **Text In Presentations**

As text is entered in a newly created presentation in **PowerPoint 2000**, the AutoFit Text feature adjusts line spacing and font size automatically to best fit on the slide.

Movies 5.3

Movies can be added to any slide presentation easily in **PowerPoint 2000**.

5.3.1 Adding Movies to PowerPoint Slides

- Bring up the slide in which a movie is to begin playing.
- Choose Insert.
- Choose **Movies and Sounds**.
- Choose Movie from File.

- Select the desired movie and click OK.
- You may be prompted to play the movie automatically or when you click the movie screen. Choose NO to play when the movie screen is clicked.
- After a moment, the file appears in a small window on the screen.
 This is your movie screen
- □ The movie screen window can be moved, re-sized, edited, opened, and re-colored.
- Double-click on the movie screen to start playing the movie.

5.4 <u>Understanding Toolbars</u>

Office of Management and Administration

Windows 2000/Office 2000 Upgrade

PowerPoint includes a number of toolbars that can streamline work. The following describes the different toolbars available.

<u>Toolbar</u>	Description
Standard	Includes tools for working with files and cutting, copying, pasting and undoing operations.
Formatting	Contains the font, size, style, alignment, spacing, and bullet options.
Animation Effects	Includes several tools you can use to add motion and sound effects to objects.
Clipboard	Shows the contents of items you've placed there during cut and copy operations.
Control Toolbox	A set of controls from Microsoft Access that will enable you to create forms readers can use for data entry.
Drawing	Contains commands for working with text used as a graphic element

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and drawing shapes with various

colors and fill patterns.

Outlining Displays buttons that enable you to

rearrange the levels of text in a

presentation.

Picture Gives a variety of options for

importing and then editing images

in PowerPoint.

Reviewing Displays a palette of seven tools to

use for reviewing a presentation: five for comments, one for **Outlook** tasks, and one for sending mail.

Tables and Borders Tools for creating and modifying

tables.

Web Offers standard browser buttons

i.e., forward and back, the URL text

box.

WordArt Tools for creating WordArt and the

tools for editing it.

6.0 General Office 2000 Tips

How to remove personalized (auto-hide) menus:

- 1. Click Tools -> Customize...
- 2. Click the Options tab.
- 3. Clear the "Menus show recently used commands first" check box.

How to separate tool bars so all shortcut buttons are viewable:

1. Locate the toolbar at the top of the screen:

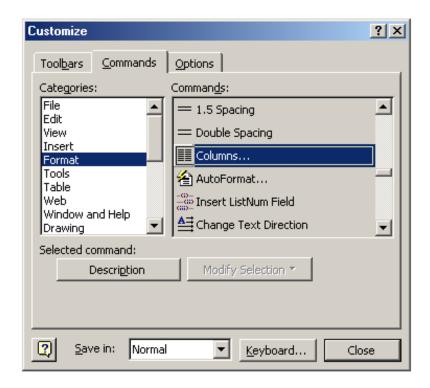


2. Click and hold down on the vertical line at the end of the toolbar, and drag toolbars around until all are positioned in desired places.



How to add/remove buttons from toolbars:

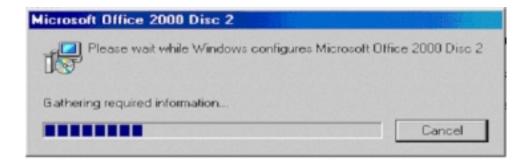
- 1. Right-click on the toolbar.
- 2. Choose Customize...
- 3. Click the Commands tab.
- 4. Scroll through Categories, and the commands in those categories.
- 5. When a desired command is found, drag-and-drop the icon onto your toolbar.



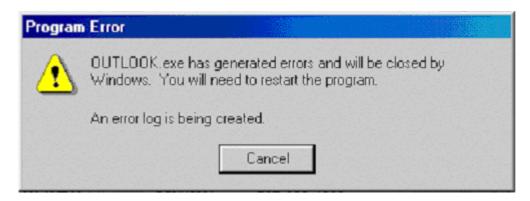
7.0 What We Hope You Won't See

NOTE: If any of the following happen to you, call the Help Desk.

- The Blue Screen of Death
- Error Messages such as:
 - Office Disk 2 Needed:



Outlook.exe or other error that says "You will need to restart the program. An error log is being created.":



8.0 Things to Check After Installation

NOTE: Try to check the items marked with an * before the installer leaves so that they can be fixed immediately if the answer is NO for any of them. If the installer has left and the answer is NO for any of the items marked with an *, call the Help Desk. For all others, follow the instructions to correct the situation as needed.

- Desktop Are all of your icons still there? *
 Do you have the screen background you had before? *
 If your passwords were synchronized, are they still? *
 Will the Backup utility run? *
 Is your screen saver still working?
- Settings Are all of your printer drivers still there (local, LAN, Acrobat)? *
 If you have a modem, is it still installed? *
- Internet Explorer Do your Favorites still exist? *
- Netscape Do your bookmarks still exist? *
 Can you send an email?
- Outlook Are all of your personal and archive folders there? *
 Does your personal address book still exist? *

Does your Contacts function have multiple entries that need to be cleaned up? *

Can you double click on an attachment and it comes up? *

Are your rules still there? *

Does the Import/Export function work? *

Is auto-archive set the way it was before the upgrade?

Is your signature still there?

Office – If you want a customized Assistant, can you select one? *

Do you want personalized menus? (Recent items shown only)